



TEA BOARD OF KENYA

Realizing the Tea Promise

KENYA TEA INDUSTRY PERFORMANCE HIGHLIGHTS FOR FEBRUARY 2024 PRODUCTION

Tea production for the month of February 2024 was higher by 22.71 Million Kgs from 32.73 Million Kgs recorded during the same period of last year to 55.44 Million Kgs. The increase in production for the month of February compared to the same month last year was attributable to rainfall received over most parts of the country during the fourth week of the month. In tea growing areas within the East of Rift Block, the amounts of rainfall ranged from an average of 10 mm daily to 21 mm. In the West of Rift Block, precipitation recorded in tea growing areas of ranged between 7mm to 28 mm. Occasional rainfall was also experienced in a few tea growing areas throughout the month especially in the West of Rift (Kericho and Bomet Counties). Consequently, production in tea growing areas within the West of Rift Block was significantly higher by 14.78 Million Kgs from 21.09 Million Kgs recorded in February 2023 to 35.87 Million Kgs. Similarly, in the East of Rift Block, the output was up by 7.93 Million Kgs from 11.64 Million Kgs to 19.57 Million Kgs. Owing to good weather conditions both in the West and East of Rift, the Smallholder Sub-sector under the Management of KTDA, recorded significant increase in production by 14.61 Million Kgs from 16.77 Million Kgs recorded during the corresponding month of 2023 to 31.38 Million Kgs. Independent tea producers also recorded increased production by 3.85 Million Kgs from 7.85 Million Kgs to 11.69 Million Kgs. Similarly, within the Plantation sub-sector output was higher by 4.35 Million Kgs from 7.59 Million Kgs to 11.94 Million Kgs. Cumulatively up to February, production for the year 2024 was higher by 26.77 Million Kgs from 87.64 Million Kgs recorded during the first two months of 2023 to 114.41 Million Kgs.



Table 1: Production by Sub-Sector and Region (Feb. 2024 vis-à-vis Feb. 2023)

Sector	Block	Feb-24	Feb-23	Var.(+/-)	Var.(%)	Jan-Feb 2024	Jan-Feb 2023	Var.(+/-)	Var.(%)
Estates	West of Rift	11,598,229	7,404,578	4,193,651	56.64%	24,709,164	20,754,360	3,954,804	19.06%
	East of Rift	349,640	186,673	162,968	87.30%	786,210	615,481	170,730	27.74%
	Total	11,947,869	7,591,250	4,356,619	57.39%	25,495,374	21,369,840	4,125,533	19.31%
Smallholders-KTDA	West of Rift	13,771,707	6,258,507	7,513,200	120.05%	27,769,939	18,435,331	9,334,608	50.63%
	East of Rift	17,615,780	10,514,207	7,101,573	67.54%	35,502,637	26,710,240	8,792,397	32.92%
	Total	31,387,487	16,772,714	14,614,773	87.13%	63,272,576	45,145,571	18,127,005	40.15%
Independents	West of Rift	10,253,944	7,098,548	3,155,396	44.45%	21,406,050	17,804,077	3,601,973	20.23%
	East of Rift	1,436,348	760,946	675,402	88.76%	3,307,611	2,235,649	1,071,962	47.95%
	Total	11,690,291	7,859,494	3,830,797	48.74%	24,713,660	20,039,726	4,673,934	23.32%
Nyayo T. Zones	West of Rift	252,638	328,391	(75,753)	-23.07%	572,826	816,091	(243,265)	-29.81%
	East of Rift	169,038	178,423	(9,385)	-5.26%	359,776	278,229	81,547	29.31%
	Total	421,676	506,814	(85,138.)	-16.80%	932,602	1,094,320	(161,718)	-14.78%
Estates, Smallholder, Independents & Nyayo Tea.Zones	West of Rift	35,876,518	21,090,024	14,786,494	70.11%	74,457,979	57,809,859	16,648,120	28.80%
	East of Rift	19,570,806	11,640,248	7,930,557	68.13%	39,956,234	29,839,598	10,116,635	33.90%
	Grand Total	55,447,323	32,730,272	22,717,051	69.41%	114,414,212	87,649,457	26,764,755	30.54%

During the month of February, speciality teas produced was 371,940 Kgs, which represented 1% of the total production. Speciality teas were dominated by Orthodox teas at 99% and was largely produced by Plantation and Independents tea factories. The rest of speciality teas consisted of Green and Purple tea types produced by the Cottage tea industries.

TEA SALES

AUCTION

During the month of February, auction sales volume for Kenya tea stood at 39.11 Million Kgs, which was lower compared to 53.21 Million kgs recorded during the corresponding month of last year. The average monthly auction price for Kenya tea was lower at 2.23 USD per Kg against 2.34 USD in the same period of last year but slightly higher than what was realized in January. During the month of February 2023, tea offered for sale by the smallholder tea factories fetched an average price of 2.30 USD per Kg for the main grades, which was lower compared to an average price of

2.66 USD in the same period of 2023 and 2.51 USD recorded in January. Lower average prices realized was on account of high number of invoices for particular garden marks offered for sale in the reprints catalogue, which fetched discounted prices as compared to similar teas offered in the main catalogue. Though there was generally good demand for tea offered at the auction, the prices continued to be impacted negatively by the effect of global economic shock experienced in most countries due to the Russia-Ukraine crisis and increasing supply of tea occasioned by good weather conditions and application of fertilizer. The crisis has continued to negatively affect the purchases at the auction especially by exporters of tea to Key markets such as Pakistan and Egypt. During the month, exporters to Russia, Iran and Sudan participated less in tea buying at the Auction. Other market dynamics such anticipated reduced demand during the Muslim Holy Month of Ramadhan as well as the cessation of winter season in March also affected the purchases at the auction.

Table 2: Auction Sales (2024 vis-à-vis 2023)

	2024		2023		Variance.			
	Vol. M. Kgs	Value (USD/KG)	Vol. M. Kgs	Value (USD/KG)	Vol.	%	Value	%
JAN.	42.48	2.19	61.25	2.30	-18.76	-31%	-0.11	-5%
FEB.	39.11	2.23	53.21	2.34	-14.10	-26%	-0.11	-26%

However, prices of tea followed the quality, with well sorted grades and those with brighter liquors attracting more competitive bids and considerably higher prices while plainer categories across the grades attracted either less interest and thus discounted prices or no bid by the buyers and consequently constituted the highest proportion of teas on offer at the auction that were withdrawn.

EXPORTS

The total export volume for the month of February 2024 was higher by 29% (12.21 Million Kgs) from 41.59 Million Kgs recorded in the same period of last year to 53.80 Million Kgs. It was also higher compared to 47.42 Million Kgs exported during the month of January 2024.

During the month, Kenya tea was shipped to fifty-three (53) export destinations compared to forty-eight (48) for the same period of last year. Pakistan maintained the

leading export destination for Kenya tea having imported 16.44 Million Kgs, accounting for 30.6% of the total export volume.

Other key export destinations for Kenya tea were Egypt (9.79 Million Kgs); UK (6.60 Million Kgs); UAE (3.50 Million Kgs); Saudi Arabia (2.14 Million Kgs); Russia (2.10 Million Kgs); Iran (1.26 Million Kgs); Yemen (1.12 Million Kgs); Poland (1.08 Million Kgs) and China (1.01 Million Kgs). The top ten export destinations, majority of which are traditional markets for Kenya tea accounted for 83% of Kenya tea export volume. Apart from Iran and Yemen, the other traditional markets recorded increased imports for Kenya tea. Notably, Chad took the 11th position having recently emerged as a key market for Kenya tea and recording consistent increase in exports from Kenya. Prior to the conflict in Sudan, Chad which is a land locked country, would get its commodity supplies including tea through Sudan. However, Since the conflict has led to the blockage of trade routes from Sudan, Chad is now using alternative transhipment routes such as Nigeria and Cameroon. Compared to the same period last year, imports of tea from Kenya to Sudan were lower by 22%. However, most of the other traditional and emerging markets recorded higher imports apart from Kazakhstan; Afghanistan; and Netherlands, whose demand continue to be affected by the global economic recession occasioned by Russia-Ukraine crisis.

There were also shipments to emerging and seasonal markets such as South Sudan; Ethiopia; Kyrgyzstan; Georgia; Angola; Australia; Central African Republic; Peru; Israel; Azerbaijan; Bahrain; Guinea; Niger; Iraq; Mexico; Italy; and Myanmar. Just like Chad, South Sudan is also rapidly growing as an emerging market for Kenya tea.

During the month of February, value added tea exports was 1.275 Million Kgs, which represented 2% of the total export the volume. The exports in value added form were shipped to twenty-two (22) market destinations which included United Kingdom; Yemen; Sudan; Oman; Pakistan; United States; Ireland; Chad; India; Burkina Faso; Cote Ivoire; Poland; Malaysia; Niger; Germany; Somalia; Guinea; Japan; Mali; Togo; Indonesia; and South Africa. Out of the total exports of value-added tea, United Kingdom accounted for the highest volume at 18% and was closely followed by Yemen, which accounted for 16%. Other markets which imported significant volumes of value added tea include Sudan; Oman; Pakistan; and United States of America.

LOCAL TEA SALES

Local tea sales for February 2024 was lower at 2.83 Million Kgs against 2.92 Million Kgs in February 2023 and 2.00 Million Kgs recorded during the corresponding month of 2022. However, cumulative tea sales for the two months period up to February 2024 was much higher at 6.13 Million Kgs against 5.94 Million Kgs for the same period of 2023.

12TH APRIL 2024

Table 3: Kenya Tea Exports by Destination (February 2024 vis-à-vis February 2023)

DESTINATION	2024- QUANTITY KGS	2023- QUANTITY KGS	QUANTITY VARIANCE KGS	%AGE VARIANCE
PAKISTAN	16,439,428	11,366,111.30	5,073,317	45%
EGYPT	9,785,929	5,602,732.09	4,183,197	75%
UK	6,599,849	5,096,464.70	1,503,384	29%
UAE	3,503,082	3,300,447.69	202,634	6%
SAUDI ARABIA	2,144,538	501,916.31	1,642,622	327%
RUSSIA	2,103,175	1,459,433.77	643,741	44%
IRAN	1,261,079	3,782,951.29	-2,521,872	-67%
YEMEN	1,121,064	1,776,569.03	-655,505	-37%
POLAND	1,077,751	300,463.51	777,287	259%
CHINA	1,010,606	88,264.62	922,341	1045%
CHAD	993,041		993,041	
SUDAN	750,406	967,491.85	-217,086	-22%
INDIA	718,014	288,134.03	429,880	149%
IRELAND	642,537	501,172.16	141,365	28%
SOMALIA	614,040	110,878.55	503,161	454%
NIGERIA	600,458		600,458	
SWITZERLAND	504,476	470,124.51	34,351	7%
KAZAKHSTAN	438,784	584,186.93	-145,403	-25%
UKRAINE	355,182	261,108.93	94,073	36%
OMAN	328,638	231,712.20	96,926	42%
AFGHANISTAN	321,270	1,651,168.50	-1,329,899	-81%
NETHERLANDS	279,880	316,561.99	-36,682	-12%
JAPAN	270,242	11,344.17	258,898	2282%
MALAYSIA	245,694	223,620.24	22,074	10%
USA	219,924	169,455.67	50,468	30%
SOUTH AFRICA	167,274	115,674.19	51,600	45%
TURKEY	133,973	88,570.55	45,402	51%
CANADA	133,312	122,977.90	10,334	8%
SOUTH SUDAN	127,618		127,618	
GERMANY	126,033	123,774.42	2,259	2%
SRI LANKA	111,231	235,303.41	-124,072	-53%
ETHIOPIA	92,608		92,608	
DJIBOUTI	76,800	44,097.86	32,702	74%
QATAR	66,194	170,181.90	-103,988	-61%
TAIWAN	48,000	33,073.39	14,927	45%
VIEET NAM	48,000		48,000	
COTE D'IVOIRE	43,982	35,659.73	8,322	23%
BURKINA FASO	41,398	28,522.49	12,876	45%
GEORGIA	28,550		28,550	
MAURITIUS	26,000	55,122.32	-29,122	-53%
GHANA	25,600		25,600	
ANGOLA	25,380		25,380	
CENTRAL AFRICAN REPUBLIC	24,218		24,218	
AUSTRALIA	24,000	3,170.08	20,830	657%
MALI	20,026	8,870.28	11,156	126%
AZERBAIJAN	18,360		18,360	
NIGER	15,522		15,522	
SINGAPORE	15,232	48,232.03	-33,000	-68%
HONG KONG	12,364	31,254.36	-18,890	-60%
GUINEA	10,348		10,348	

BAHRAIN	7,200		7,200	
MYANMAR	2,028		2,028	
CZECH REPUBLIC	200		200	
UZBEKISTAN	-	64,079.70	-64,080	-100%
BANGLADESH		108,303.57	-108,304	-100%
CONGO DRC		23,990	-23,990	-100%
ERITREA		179,147.58	-179,148	-100%
INDONESIA		119,913.10	-119,913	-100%
ISRAEL		33,073.39	-33,073	-100%
JORDAN		773,090.57	-773,091	-100%
SPAIN		55,935.38	-55,935	-100%
SWAZILAND		1,072.13	-1,072	-100%
ZAMBIA		34,233.72	-34,234	-100%
TOTAL	53,800,538	41,599,638	12,200,900	29%

Table 4: Kenya Tea Exports by Destination (Jan.- Feb. 2024 vis-à-vis Jan.- Feb. 2023)

DESTINATION	2024- QUANTITY KGS	2023 - QUANTITY KGS	QUANTITY VARIANCE KGS	%AGE VARIANCE
PAKISTAN	32,406,782	27,438,033	4,968,749	18%
EGYPT	17,155,197	12,837,754	4,317,443	34%
UK	12,364,666	9,673,567	2,691,099	28%
UAE	6,258,585	5,704,097	554,488	10%
RUSSIA	4,099,245	3,008,063	1,091,182	36%
SAUDI ARABIA	3,574,017	1,273,538	2,300,479	181%
YEMEN	2,464,620	3,753,459	-1,288,839	-34%
IRAN	2,392,649	4,065,878	-1,673,229	-41%
POLAND	2,029,740		2,029,740	
CHAD	1,715,270		1,715,270	
CHINA	1,414,933	226,823	1,188,110	524%
IRELAND	1,360,685	973,934	386,751	40%
SOMALIA	1,239,398	264,832	974,566	368%
SUDAN	1,202,802	1,995,973	-793,171	-40%
INDIA	1,138,352	519,967	618,385	119%
SWITZERLAND	1,113,292	901,740	211,552	23%
UKRAINE	934,103	739,207	194,896	26%
KAZAKHSTAN	852,891	1,391,260	-538,369	-39%
NIGERIA	852,458	379,336	473,122	125%
AFGHANISTAN	808,958	2,629,420	-1,820,462	-69%
OMAN	698,818	231,712	467,106	202%
NETHERLANDS	640,335	639,768	567	0%
USA	483,638	359,225	124,413	35%
JAPAN	455,162	110,132	345,030	313%
SOUTH AFRICA	400,681	202,090	198,591	98%
SOUTH SUDAN	399,948		399,948	
SRI LANKA	384,605	252,157	132,448	53%
MALAYSIA	375,406	304,518	70,888	23%
TURKEY	333,079	122,278	210,801	172%
GERMANY	315,693	221,422	94,271	43%
QATAR	211,075	360,760	-149,685	-41%
CANADA	159,312	152,848	6,464	4%
DJIBOUTI	101,225	44,098	57,127	130%
ETHIOPIA	79,828		79,828	
MAURITIUS	66,000	55,122	10,878	20%
TAIWAN	65,960	108,850	-42,890	-39%
COTE D'IVOIRE	59,504	42,368	17,136	40%
VIET NAM	54,595		54,595	
GHANA	53,800	14,074	39,726	282%
BURKINA FASO	51,746	65,421	-13,675	-21%
KYRGYZSTAN	48,000		48,000	
HONG KONG	47,502	62,148	-14,646	-24%
SINGAPORE	38,332	67,679	-29,347	-43%
GEORGIA	28,550		28,550	
ANGOLA	25,380		25,380	

ROMANIA	25,280	27,588	-2,308	-8%
MALI	25,200	8,870	16,330	184%
AUSTRALIA	24,500	3,170	21,330	673%
CENTRAL AFRICAN REPUBLIC	24,218		24,218	
PERU	24,000	831,985	-807,985	-97%
UZBEKISTAN	23,400	95,194	-71,794	-75%
ISRAEL	20,080	33,073	-12,993	-39%
AZERBAIJAN	18,360		18,360	
BAHRAIN	15,696		15,696	
GUINEA	15,522	6,708	8,814	131%
NIGER	15,522	6,708	8,814	131%
IRAQ	14,229		14,229	
MEXICO	9,000		9,000	
BANGLADESH	7,200	108,304	-101,104	-93%
ITALY	4,600	5,964	-1,364	-23%
INDONESIA	2,600	123,284	-120,684	-98%
MYANMAR	2,217	33,707	-31,490	-93%
SWAZILAND	778	1,072	-294	-27%
FRANCE	300		300	
CZECH REPUBLIC	200	130	70	54%
BENIN		6,708	-6,708	-100%
BRAZIL		7,779	-7,779	-100%
CHILE		48,135	-48,135	-100%
CONGO DRC		23,990	-23,990	-100%
ERITREA		179,148	-179,148	-100%
JORDAN		1,112,756	-1,112,756	-100%
SENEGAL		20,124	-20,124	-100%
SPAIN		114,140	-114,140	-100%
ZAMBIA		34,234	-34,234	-100%
TOTAL	101,229,719	84,026,322	17,203,397	20%

